



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty Roberts, Gregory, of Barrus & Roberts (for Petitioners Pedro Cervantes and Susan Cervantes)

(1) First and Final Account and Report of Guardian and Petition for Its Approval; (2) for Allowance of Attorney's Fees and Costs; (3) Discharge or Guardian of Person; and (4) Authority to Deliver Assets

Age: 19 years			<b>PEDRO CERVANTES and SUSAN CERVANTES</b> , maternal grandparents and Co-Guardians of the Person and Estate appointed on 1/7/1999, are Petitioners.  <u>Account period: 1/7/1999 – 8/9/2010</u> Accounting - <b>\$173,712.00</b> Beginning POH - <b>\$131,531.20</b> Ending POH - <b>\$173,712.00</b> ( <i>all cash</i> )  Co-Guardians - <b>waive</b>  Attorney - <b>\$1,400.00</b> ( <i>per Declaration, which includes 1 hour estimated for attorney's review of documents and attendance at hearing</i> )  Attorney Costs - <b>\$421.00</b> ( <i>filing fees and certified copies</i> )  <b>Petitioners state</b> they received a check from Thrift Savings Plan [from the ward's deceased mother's participation via her former employer] for <b>\$10,769.85</b> , and without realizing the funds were to go into a blocked account, the Petitioners used the funds to purchase bedroom furniture, clothing and to pay for medical bills of the minor; these funds were mistakenly not placed in a blocked account and not kept track of as part of the guardianship account, as these funds went directly to Petitioners and not through their counsel's office ( <i>please refer to Declaration of Susan Cervantes filed 1/9/2012.</i> )  ~Please see additional page~	<b>NEEDS/PROBLEMS/COMMENTS:</b>
DOB: 8/9/1992				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: LEG

Reviewed on: 2/17/12

Updates:

Recommendation:

File 1 - Strickland

***Declaration of Susan Cervantes filed 1/9/2012*** states she did not realize the Thrift Savings Plan funds she was using were to be held in a blocked account; that she and the Co-Guardian have purchased things for the minor over the years and the costs have far exceeded the **\$10,769.85**; and she apologizes to the Court for the error.

***Declaration of Jordan Strickland filed 1/9/2012*** states he went to CITIBANK after his 18<sup>th</sup> birthday and requested to withdraw money from his account, and the bank allowed him to open a personal account and transfer money from the guardianship account into a checking account; he is the only person who has withdrawn money from the account, and his grandparents and court-appointed Guardians have not taken any money from the account; he also went to CHASE bank to withdraw his money and that bank told him he needed a court order and would not release any money to him without a court order; he did not know that he could not use the money or take the money out of the accounts without a court order; he apologizes to the Court if he has done anything wrong, as he thought the money was his and that he could use it how he wanted.

**Petitioners request** that the guardianship be terminated as the former ward attained the age of 18 years on 8/9/2010; Petitioners request that they be discharged as Guardians of the Person and Estate of the former ward.

**Petitioners pray for an Order:**

1. Settling and allowing the First and Final Account and report and confirming the acts of the Petitioners and Guardians of the Estate for the account period;
2. Authorizing Petitioners to pay the attorney fees and reimbursement of costs advanced;
3. Discharging the Petitioners as Guardians of the Estate; and
4. Authorizing Petitioners to deliver the property remaining in their possession to Jordan Everett Strickland, and to facilitate this delivery, authorizing the unblocking of the Chase bank account and the Citibank account.



- Petitioner paid out of her own funds **\$1,400** to settle an individual's claim against the estate;
- Petitioner submitted a claim against the estate for **\$20,549.49**, documented in full as *Attachments 1 through 6* to the *First Account and Report* filed 1/11/2011 [*Order Settling First Account and Report of Administration was signed 4/7/2011*]; Petitioner was not reimbursed at the time of the first account, and requests **\$6,673.54** of the total amount she expended be reimbursed to her;
- While Petitioner has made other payments in the last year on behalf of the estate, she is not seeking reimbursement for any of those expenditures; there are insufficient funds to reimburse her for the expenditures;
- Items of household furniture valued at **\$500.00** on the *Inventory and Appraisal* were not realistically saleable and so were given to heirs who wanted them and were in position to take them;
- There will be no distribution to any of the Decedent's heirs because [there are insufficient funds], even with the waiver of compensation by Petitioner as Administrator, a significant reduction in attorney's fees for the probate action, and no charging of attorney's fees in connection with the separate lawsuit with the Department of Health Care Services [10CECG02260].

**Petitioner prays for an Order:**

1. Settling, allowing and approving the *First Account* of Petitioner as Administrator, and confirming and approving all acts and proceedings of Petitioner as Administrator;
2. Authorizing and directing Petitioner to pay the attorney's compensation of **\$4,500.00** and reimbursement of **\$2,085.10** costs advanced by the attorney;
3. Authorizing Petitioner to pay herself **\$6,673.54** as satisfaction of her claim as creditor of the estate;
4. Distributing any other property of Decedent or the estate not now known or discovered to the persons entitled to it, Decedent's children, as follows: 1/5<sup>th</sup> each Eugenio Lozano, Rosanelia Garcia, Richard Lozano, Mary Helen Jasso, and Irma Lozano; and
5. Discharging and releasing Petitioner from all liability to be incurred hereafter upon the filing of receipts [*Examiner added: and approval of an Ex Parte Petition for Final Discharge and Order.*]

Atty Hernandez, Teresa (pro per Guardian)

Atty Attashian, Zepure (for Petitioner/mother Eliza Frausto)

**Respondent's Notice of Motion and Application to Reconsider and Revocation of Order Re: Supervised Visits, and Retroactive Stay of Proceedings, Alternatively, a Request to Participate in Court Investigation Regarding Modification of Visitation, Memorandum of Points and Authorities and Declaration of Respondent in Support**

Erika age: 7 years DOB: 9/21/04	<p><b>ELIZA FRAUSTO</b>, mother, is petitioner.</p> <p><b>TERESA HERNANDEZ</b>, paternal grandmother, was appointed guardian on 2/9/2009.</p> <p><b>Petitioner requests</b> this Court reconsider its order of 1/4/2012 modifying the visitation.</p> <p><b>Petitioner states</b> on 5/21/2009, the Guardian Teresa Hernandez filed and served a Citation and Petition to Declare the Minors Free from mother's custody (case nos. 09CEFL03194, 03199, 03200).</p> <p>The petition to terminate the mother's parental rights is pending.</p> <p>On January 4, 2012 mother states she appeared in this court on a Petition to Modify the Guardianship Visitation Orders from unsupervised to supervised. The Court, unaware of the pending Petition to Declare the Minor Child Free from Mother's Care, modified the visitation orders.</p> <p>Petitioner alleges as a result of the pending termination, the guardianship orders are stayed and cannot be modified. Accordingly she is requesting the Court vacate its 1/4/2012 order and reinstate the previous visitation orders pending resolution of the pending termination of her parental rights.</p> <p>Alternatively, Petitioner asks that the court refer Teresa (guardian) and mother to an additional assessment with a Court Investigator. Mother alleges the current visitation order providing her with supervised visits only, are unjustified.</p> <p>Petitioner states during their last few visits the children have been begging her to take them home for the visits. They are not comfortable with Teresa supervising the visits. Petitioner states the children's safety, health and wellbeing are her first priority.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <i>Need Notice of Hearing.</i></p> <p>2. <i>Need proof of service of the Notice of Hearing on:</i></p> <p>a. <b>Teresa Hernandez (guardian/paternal grandmother)</b> <u>Note:</u> A proof of service was filed showing service of the Notice of Motion and supporting documents, however a <i>Notice of Hearing</i> has not been filed.</p> <p>3. <b>Need Order</b></p>	
Logan age: 5 years DOB: 2/25/07			
Jaydin age: 3 years DOB: 7/28/08			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			X
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 2/21/12.	
		Updates:	
		Recommendation:	
		File 3 - Hernandez	

Atty Cross, Robert W. M., sole practitioner of Selma (for Petitioner Rebba Workmon)

## (1) First and Final Report of Executor on Waiver of Account and (2) Petition for Allowance of Compensation to Attorney for Ordinary Services and for (3) Final Distribution

<b>DOD: 6/1/2009</b>		<b>REBBA WORKMON</b> , daughter and Executor with Full IAEA without bond appointed on 5/18/2010, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Proposed order does not comply with Local Rule 7.6.1(A) providing that monetary distributions must be stated in dollars, and not as a percentage of the estate. Need revised proposed order containing the dollar amount to be distributed to each distributee, along with the percentage to each of the Note secured by Deed of Trust.</b>
		Accounting is waived.	
<b>Cont. from</b>		I & A - <b>\$312,007.29</b>	
<input type="checkbox"/>	<b>Aff.Sub.W</b>	POH - <b>\$286,071.57</b> (\$284,451.57 is cash)	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>	Executor - <b>waives</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>		
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Attorney - <b>\$5,500.00</b> (less than statutory of \$9,240.15; Note: Petition calculates statutory fees based upon a loss on the sale of the real property; no loss should be included, as payment of seller's costs are not considered a loss;)	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Costs - <b>\$1,152.40</b> (filing fees, probate referee, publication, certified copies)	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>	<b>Petitioner states:</b>	
	<b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>Petitioner took the following actions with close communication with <b>CAROLYN E. KENDRICK</b>, the other distributee: sold motor home for its inventoried value of <b>\$100</b>; sold pickup truck for its inventoried value of <b>\$13,000</b> to Carolyn Kendrick by receipt in the estate of <b>\$5,000</b> cash and by receipt of the Petitioner of an old tractor; Petitioner and Carolyn Kendrick disposed of other personal property jointly by mutual agreement;</li> <li>Petitioner sold the real property residence located at 6726 E. Clarkson in Selma for its appraised value of <b>\$160,000</b> in July 2011 following service of <i>Notice of Proposed Action</i> and written consent of Carolyn Kendrick;</li> <li>A Note with an inventoried value of <b>\$4,110.67</b> secured by a Deed of Trust on the real property located at 15528 S. Hughes has now been paid down to <b>\$1,619.95</b> with continuing monthly payments of <b>\$100</b>.</li> </ul>	
	<b>Letters</b> 051810		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>	<b>Distribution pursuant to Decedent's Will is to:</b>	
<input checked="" type="checkbox"/>	<b>FTB Notice</b>	<ul style="list-style-type: none"> <li><b>REBBA WORKMON</b> – [\$138,899.59 cash] and <b>50% interest</b> in the Note secured by Deed of Trust on real property located at 15528 S. Hughes;</li> <li><b>CAROLYN E. KENDRICK</b> – [\$138,899.59 cash] and <b>50% interest</b> in the Note secured by Deed of Trust on real property located at 15528 S. Hughes.</li> </ul>	

Reviewed by: LEG

Reviewed on: 2/21/12

Updates:

Recommendation:

File 4 – Powell

(1) Petition for Settlement on Waiver of Account; (2) Petition for Final Distribution  
and for (3) Allowance of Compensation for Ordinary Services

<b>DOD: 5/27/2010</b>		<b>MICHAEL W. McNIFF,</b> Administrator, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Attorney made a math error in the calculation of statutory attorney fees. The correct amount for statutory fees is \$5,957.50 and not \$6,957.50 as listed in the petition and the order. The attorney has agreed to accept \$4,000.00 as her fee for ordinary services, therefore distribution is not affected. Examiner has interlineated the order to reflect the correct amount of statutory fees.
		Accounting is waived.	
<b>Cont. from</b>			
	Aff.Sub.Wit.	I & A -	
✓	Verified	<b>\$160,000.00</b>	
✓	Inventory	POH - <b>\$ 61,002.88</b>	
✓	PTC	Administrator - <b>waives</b>	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney - <b>\$4,000.00</b> (less than statutory)	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.	<b>Distribution, pursuant to intestate succession, is to:</b>	
	Pers.Serv.		
	Conf. Screen	Michael W. McNiff - <b>\$19,000.96</b>	
✓	Letters 10/18/10	Mark McNiff - <b>\$19,000.96</b>	
	Duties/Supp	Richard McNiff - <b>\$19,000.96</b>	
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: KT Reviewed on: 2/22/12 Updates: Recommendation: SUBMITTED File 5 - McNiff



Atty Roberts, Gregory J., of Barrus & Roberts (for Petitioner Gail Brown, Successor Trustee)  
 Atty Bagdasarian, Gary G., sole practitioner (for Objectors Anna Hinley and Frances Albers)  
 Atty Lind, Ruth P., sole practitioner (for James Louis Roberts, Executor of the Estate of Chester Beeler)

**First Account of Trustee, Report of Trustee, Confirmation of Payment to Creditors and Allowance of Payment to Creditors, Fixing of Trustee's Compensation, and Approving Payment of Attorneys Fees and for Preliminary Distribution (Prob. C. 17200)**

Chester Beeler DOD: 12/29/2009		<b>GAIL BROWN</b> , niece and Successor Trustee appointed on 11/17/2010 with all cash to be deposited in blocked accounts, is Petitioner.  Account period: 11/17/2010 – 1/15/2012 Accounting - <b>\$525,148.04</b> Beginning POH - <b>\$523,271.40</b> Ending POH - <b>\$483,142.55</b> <i>(\$316,836.16 is cash)</i>  Trustee - <b>\$13,502.96 or \$13,000.00 ?</b>  Attorney - <b>\$19,032.93</b>  Reserve - <b>\$10,000.00</b> <i>(for payment of any federal and state income taxes owed by the estate, accounting fees, closing expenses, additional attorney and trustee fees, and any other liabilities determined to be due from the trust estate;)</i>  <b>Petitioner states:</b> <ul style="list-style-type: none"> <li>Distribution terms of the Trust are set forth in Sections 4.03(a), (b), (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 3<sup>rd</sup> Amendment, and subsection (c) was amended by the 2<sup>nd</sup> Amendment to the Trust;</li> <li>Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case <b>10CEPR00104</b>); however, the distribution terms of the Trust as amended are set forth in this <i>Petition</i>, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, <b>JAMES LOUIS ROBERTS</b>, Pastor of West Park Baptist Church, has not followed the agreement of the parties;</li> <li>Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Probate pursuant to the terms of the agreement;</li> </ul>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need proposed order.</b>  <b>Note: Paragraph 13 of the <i>Petition</i> requests \$13,502.96 for Trustee's fees, while the calculation for the preliminary distributions deducts an even \$13,000.00 for Trustee's fees.</b>
Mary Lorene Beeler DOD: 4/2/2010			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W /		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

~Please see additional page~

Reviewed by: LEG
Reviewed on: 2/21/12
Updates:
Recommendation:
File 6 - Beeler

**Petitioner states, continued:**

- Pursuant to an ex parte petition and order of the Court, the Trustee paid several medical services creditors, including Golden Living Center care facility, for a total sum of **\$6,993.28**;
- There are 4 creditors that have not been paid, consisting of the Petitioner and persons related to the Petitioner; Petitioner seeks Court approval to pay the following claims totaling **\$29,106.15**:
  - **\$3,118.00** to **ERIC BROWN** [*relationship to the Decedent or Petitioner unstated*], for medical bills and lost wages due to injury sustained while working at the Beeler property getting it ready for sale; medical bill was **\$118.00**, and he was unable to work for 10 days at his job as a self-employed plumber making **\$600.00** per day, thus Mr. Brown claimed lost wages of **\$6,000.00** for 10 days work; Trustee agreed to settle the claim for **\$3,000.00** plus the medical expenses (*please refer to Exhibit 1 for copy of written request to Trustee and copy of urgent care medical evaluation and bill*);
  - **\$12,750.45** to **GAIL BROWN** (Trustee, niece) and **\$9,396.38** to **DONNA WYATT** [*relationship to the Decedent or Petitioner unstated*], for the care of Chester and Lorene for ~8 months by Donna, who understood that she was to be compensated for her work; and for the care of Lorene after Chester's death, as it is specifically stated in Chester's Will that Gail is to be paid and compensated for taking care of Lorene after Chester's death; Gail and Donna paid bills with their own funds and took care of the Beelers (*please refer to Exhibits 2 and 3 for summaries of their work and receipts for expenses*);
  - **\$3,841.32** to **LANCE ARMO**, Attorney for Donna Wyatt and Gail Brown in the initial probate proceedings and the will contest until Petitioner Gail Brown's current attorney substituted in; Petitioner paid Mr. Armo \$2,725.00 and Mr. Armo claims a balance due of \$1,116.32 (*please refer to Exhibit 4 for copies of his invoices*); Petitioner requests to be reimbursed the amount she has paid, and for approval to pay the balance due to Mr. Armo.
- After a *Notice of Proposed Action* was mailed to all interested parties on 11/5/2010, and no objections were received, the Trustee sold the real property at 6205 W. Dudley in Fresno for **\$190,000.00**, with escrow closing on 1/13/2011; proceeds from the sale deposited into the blocked estate account totaled **\$154,987.79**;
- The Trust is a beneficiary of the Probate Estate (Case 10CEPR00104) and should receive funds in excess of **\$100,000**; no funds have yet been received from the Probate Estate;
- Trustee will pay taxes that become due, and Trustee has paid expenses of Trust administration except for claims of Eric Brown, Gail Brown, Donna Wyatt, Lance Armo, and Trustees and attorney's fees;
- The Trust does not specify the Trustee's compensation; pursuant to Probate Code § 15681, the Trustee is entitled to reasonable compensation, which Petitioner believes to be **\$13,502.96** computed on a fee base of **\$525,148.04** for services similar to that performed by an executor of an estate;
- Petitioner's attorney has rendered services on behalf of the Trust administration and of the related probate petitions; services through 12/31/2011 and costs advanced (of \$557.62) total **\$19,032.93** (*please refer to Exhibit 6 for Declaration in Support of Request for Compensation for Attorney's Services, stating in part: on 8/3/2010 the parties attended a settlement conference with Judge Kazanjian at which it was agreed that Attorney Ruth Lind's fees would be paid out of the Probate Estate, and Attorneys Barrus & Roberts would be paid out of the Trust administration*).

*~Please see additional page~*

**Petitioner requests authorization to make the following preliminary distributions** from the remaining cash on hand of **\$245,697.08**, which will be available for distribution after payment of creditors, trustees compensation, attorney's fees, and closing reserve (as noted above). Petitioner states the pecuniary gifts set forth in Section 4.03(b) of the Trust total **\$300,000.00**, and the Trustee would like to distribute **\$240,000.00 or 80% of each bequest**, as follows:

1. ANNA B. HINNLEY – **\$32,000.00**
2. WEST PARK BAPTIST CHURCH – **\$80,000.00**
3. BETTY RODGERS – **\$32,000.00**
4. FRANCES ALVERS – **\$32,000.00**
5. GAIL BROWN – **\$32,000.00**
6. JOHN H. BEELER – **\$32,000.00**

**Petitioner states** it is anticipated the Trust will receive in excess of **\$100,000** from the Probate Estate, and the Trust is also receiving payments of **\$1,166.52** on the promissory note asset; if the Trust receives the **\$100,00**, the Trust will have sufficient funds to pay the balance of the pecuniary gifts; after there are sufficient cash funds to pay the balance of the pecuniary gifts, the estate residue will be paid to the Fresno Rescue Mission; the Trustee anticipates it will distribute the remaining cash and the promissory note to the Fresno Rescue Mission and close the estate.

**Petitioner prays for an Order:**

1. Settling, allowing and approving the First Account and Report of the Petitioner as Trustee;
2. Confirming and approving all acts of and proceedings of the Petitioner as trustee relating to the matters set forth in the account;
3. Authorizing and directing the Trustee to pay the creditors the amounts identified in the Petition *[noted above]*;
4. Authorizing and directing the Trustee to pay the attorney compensation and reimbursement of costs advanced through 12/31/2011; and
5. Allowing Petitioner to make preliminary distribution of pecuniary bequests in the amount of **\$240,000.00** *[as noted above]*.

***Response and Objection to First Account of Trustee, Report of Trustee, Confirmation of Payment to Creditors and Allowance of Payment to Creditors, Fixing of Trustee's Compensation, and Approving Payment of Attorney's Fees and for Preliminary Distribution filed on 2/20/2012 by ANNA B. HINLEY and FRANCES ALBERS states:***

- They are residents of the State of Maryland and are beneficiaries under Decedent's Will (Case 10CEPR00104) and of the Trust;
- As described by Petitioner Gail Brown, an agreement was reached by the parties participating in the settlement conference in the Probate matters that modify the distribution terms set forth in the Will and Trust; the agreement was a basis for allowing Pastor James Roberts to act as the Executor of the Estate;
- While the distribution terms under the agreement, which was never signed, have not been followed to date, the beneficiaries have agreed to allow the administration to progress through the preliminary distribution of the Probate estate and now of the Trust estate in order to move the administration of each matter along; however, as part of the agreement initially between the parties, the attorneys for the Executor were to be paid out of the Estate upon Court approval and attorneys for the Trustee were to be paid out of the Trust upon Court approval; the fees for the beneficiaries, Hinley and Albers, were to be paid equally from the Probate estate and the Trust estate;
- With that understanding, the *Declaration of Gary Bagdasarian in Support of Payment of Attorney's Fees on Behalf of Beneficiaries and Hinley and Albers* is attached, reflecting a total amount of **\$35,280.00** and costs of **\$455.71**;
- Request is made that all costs and ½ of the fees in the amount of **\$17,640.00 or a total of \$18,095.71 be paid from the Trust.**

## Probate Status Hearing Re: Filing of Inventory and Appraisal

Age:			NEEDS/PROBLEMS/COMMENTS:  <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>Inventory and Appraisal filed 2-9-12.</p>
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skc Reviewed on: 2-21-12 Updates: Recommendation: File 7 - Eaton			

**Accounting by James L. Saccheri**

			<b>JAMES L. SACCHERI</b> is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Proof of service of the <i>Notice of Hearing</i> indicates the <i>Notice of Hearing</i> was mailed on 2/9/12, 20 days notice and not 30 days as required by Probate Code §17203.</b>  <b>2. Need order.</b>
			Account period: 6/20/2002 – 7/1/2008	
<b>Cont. from 011812</b>			Accounting - \$419,906.61	
	<b>Aff.Sub.Wit.</b>		Beginning POH - \$299,293.44	
✓	<b>Verified</b>		Ending POH - \$ 53,417.09	
	<b>Inventory</b>		<b>Petitioner prays that the accounting for the period of 6/20/2002 – 7/1/2008 be settled, allowed and approved.</b>	
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	W/O		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>	X		
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
				<b>Reviewed by: KT</b>
				<b>Reviewed on: 2/21/12</b>
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 8 – Marando</b>

**(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution**

<b>DOD: 10-11-10</b>		<b>PUBLIC ADMINISTRATOR</b> , Executor with Full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. The Decedent's will appoints the Public Administrator as Executor without bond. However, the Public Administrator requests payment of a bond fee pursuant to Probate Code §7621(d).</b>  The Court may require clarification regarding the applicability of this section when specifically nominated without bond pursuant to will.  <b>2. The Decedent's will specifically devises his estate as follows:</b>  <p>“...to the County of Fresno, a Political Subdivision of the State of California. It is my wish and desire that the property distributed to said County of Fresno be used by its Parks and Recreation Division. In the use of said estate, it is my further wish and desire that reasonable and appropriate recognition be given to the memory of my father, Floyd Lawrence and my mother, Mildred Lawrence, and to my memory.”</p> <p>The proposed order simply distributes the funds to:  “John A. Navarette, County Administrative Officer.”</p> <p>The Court may require the order to contain more specific language.</p>
		Account period: 5-4-11 through 12-28-11	
		Accounting: \$829,675.23	
		Beginning POH: \$782,675.23	
		Ending POH: \$799,225.85 (cash)	
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	5-4-11	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

**Amended Petition for Probate of Will and for Letters of Administration with Will Annexed;  
Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 9-27-11</b>			<b>JIMMIE DALE REIS</b> , Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond.  All heirs waive bond  Full IAEA – <i>Need publication</i>  Decedent died intestate  Residence: Laton, Fresno County, CA Publication: <i>Need publication</i>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Proof of publication.  <u>Note:</u> Petitioner estimates that the estate consists of annual income from real and personal property; however, no real or personal property is included as asset of the estate. Examiner notes that because all heirs waive bond this is not an issue at this time; however, the Court may require some clarification as to the nature of the assets.  <u>Note:</u> Petitioner originally requested to admit Decedent's will dated 12-10-77 to probate; however, this amended petition indicates that Decedent died intestate.  <i>Examiner notes that the will devises the entire estate to Decedent's five children, which is the same as intestate succession. Petitioner's siblings consent to his appointment and waive bond.</i>
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail	W		
<input type="checkbox"/>	Aff.Pub.	X		
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<b>Estimated Value of Estate:</b> Annual income: \$255,000.00  Probate Referee: Rick Smith	
				Reviewed by: skc Reviewed on: 2-22-12 Updates: Recommendation: File 10 - Reis

First Amended Petition for Letters of Administration; Authorization to Administer  
Under IAEA (Prob. C. 8002, 10450)

DOD: 12-19-11		<b>PHILIP A. HAUSMANN</b> , Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond.  All heirs waive bond.  Full IAEA – <i>Need publication</i>  Decedent died intestate.  Residence: Fresno Publication: <i>Need publication</i>  <b>Estimated value of estate:</b> Personal property: \$54,831.00 Real property: \$12,000.00 (Estimated value of \$160,000.00 less encumbrance of \$148,000.00) Total: \$66,831.00  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Petitioner was appointed Special Administrator on 1-12-12 for the purpose of accessing certain bank accounts to maintain payments on Decedent's mortgage and vehicle and pay funeral expenses. Special Administration expires 2-29-12.  <u>Note:</u> Petitioner originally requested to admit Decedent's will dated 10-28-77 to probate; however, the will is not self-proving and no subscribing witnesses can be found.  <i>Examiner notes that the will devises the entire estate to Decedent's two sons, which is the same as intestate succession. Petitioner's brother consents to his appointment and waives bond.</i>  1. Need proof of publication.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/O
	Aff.Pub.			X
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: skc
Reviewed on: 2-22-12
Updates:
Recommendation:
File 11B - Hausmann



## Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 9-23-11</b>			<b>SHAWNA ROBBINS, LA RON ALIPAZ, daughters, and ROBBIE ROBBINS, son, are Petitioners.</b>  40 days since DOD  No other proceedings  I&A: \$70,000.00  Decedent died intestate  Petitioners request court determination that Decedent's 100% interest in certain real property located in Fresno passes to them in equal undivided one-third interests pursuant to intestate succession.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
✓	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>	W		
	<b>Aff.Mail</b>			
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 2-22-12	
			<b>Updates:</b>	
			<b>Recommendation:</b> SUBMITTED	
			<b>File</b> 12 - Nelson	

**Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9**

			<b>JANICE POTTER</b> is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>Petitioner states</b> she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	<b>1. Petitioner requests the court order the Trustee to turn over relevant information on the administration of the trust. Under Probate Code 16061 the Trustee has a duty to report said information regarding the administration of the trust to a beneficiary, relevant to the beneficiary's interest. There has been no determination at this point that Petitioner is a beneficiary of the trust only that she is an heir of the Trustor.</b>
<b>Cont. from</b>			Betty Ruth Cozby died in April 2011.	<b>2. Need Order.</b>
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>		Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty Ruth Cozby Trust.	
✓	<b>Aff.Mail</b>	W/		
	<b>Aff.Pub.</b>		Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.	
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>		Probate Code §16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.	
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
	<b>Order</b>	X		
	<b>Aff. Posting</b>		<b>Wherefore, Petitioner seeks relief as follows:</b>	
	<b>Status Rpt</b>		1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any;	
	<b>UCCJEA</b>		2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;	
	<b>Citation</b>		3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.	
	<b>FTB Notice</b>			
				<b>Reviewed by: KT</b> <b>Reviewed on: 2/22/12</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 13 - Cozby</b>

**Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions (Prob. C. 10400-10406, 10904, 11600, 11642)**

<b>DOD: 8/7/2010</b>	<b>PATRICK McLEMORE</b> , son and Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.		<u>Continued from 1/24/2012. Minute Order states the matter is continued to 2/29/2012 at the request of the Petitioner.</u>
			<u>The following issues from the last hearing remain:</u>
Cont. from 012412	I & A -	\$145,000.00	1. Need <i>Notice of Hearing</i> of the <i>Petition for Final Distribution on Waiver of Accounting</i> , and proof of mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 11000 and 11601 for the following persons:
Aff.Sub.Wit.	POH -	\$125,000.00	<ul style="list-style-type: none"> <li>• Mark A. Troutman, son</li> <li>• Cheryl A. Widener, daughter;</li> <li>• Peggy E. Turner, step-daughter;</li> <li>• Kelly J. Basoco, step-daughter.</li> </ul>
✓ Verified	Administrator -	[\$5,260.00]	2. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> for Union Bank per the <i>Request for Special Notice</i> filed 1/25/2011, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.
✓ Inventory	(statutory)		3. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> for Scott Weltman, Esq. (for Bank of America) per the <i>Request for Special Notice</i> filed 9/16/2010, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.
✓ PTC			4. Pursuant to Local Rule 7.12.4, the Court will not order distribution of real property in undivided interests without the written consent of all distributees. Need written consent of:
✓ Not.Cred.			<ul style="list-style-type: none"> <li>• Patrick McLemore, step-son;</li> <li>• Mark A. Troutman, son;</li> <li>• Cheryl A. Widener, daughter;</li> <li>• Peggy E. Turner, step-daughter;</li> <li>• Kelly J. Basoco, step-daughter.</li> </ul>
Notice of Hrg			5. Statutory fee base does not include the \$3,000.00 loss on sale of Decedent's automobile. Correct statutory fee calculates as \$5,260.00 when the loss is taken into account as required by Probate Code § 10800. Proposed order does not contain a finding for award of statutory commissions to Petitioner as is requested in the <i>Petition</i> . Need revised proposed order awarding the correct amount of statutory compensation to the Petitioner as Administrator.
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters	101310		
Duties/S			
Objections			
Video Receipt			
CI Report			
✓ 9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
✓ FTB Notice			
			Reviewed by: LEG
			Reviewed on: 2/17/12
			Updates:
			Recommendation:
			File 14 - McLemore

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

Age: 7 months DOB: 07/27/11		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>VIOLETA ALCANTAR</b> , maternal grandmother, is Petitioner.		<b>1. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for:</b> <b>- Christian Lopez (father)</b>	
		Father: <b>CHRISTIAN LOPEZ</b>			
		Mother: <b>FLOR VIOLETA SERRATOS</b> – <i>consent and waiver of notice filed 02/01/12</i>			
Cont. from		Paternal grandfather: JOE LOPEZ – <i>served by mail 01/27/12</i>			
	Aff.Sub.Wit.	Paternal grandmother: TERESA LOPEZ – <i>served by mail 01/27/12</i>			
✓	Verified	Maternal grandfather: RIGOBERTO SERRATOS – <i>served by mail 01/27/12</i>			
	Inventory	Petitioner states that the mother is only 16 and is not exhibiting the maturity necessary to properly care for her son. Petitioner states that she has been the primary care provider and has supported the baby since birth.			
	PTC	Petitioner states that the mother has threatened to run away and take the baby with her. Petitioner states that the father is 18 and currently on probation for burglary. Father has a history of substance abuse and arrest and is not able to properly care for the child.			
	Not.Cred.	<b>Court Investigator Julie Negrete's report was filed 02/14/12.</b>			
✓	Notice of Hrg				
✓	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 02/22/12	
				Updates:	
				Recommendation:	
				File 15 - Lopez	

Atty Carmickle, Dennis (pro per – paternal step-grandfather)

Atty Carmickle, Kimberly Rene (pro per – paternal grandmother)

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 4 DOB: 08/23/07		<p><b><u>TEMPORARY EXPIRES 02/29/12</u></b></p> <p><b>KIMBERLY CARMICKLE</b> and <b>DENNIS CARMICKLE</b>, paternal grandmother and step-grandfather, are Petitioners.</p> <p>Father: <b>KEVIN ROSS WOOLF</b> – <i>consent and waiver of notice filed 12/28/11</i></p> <p>Mother: <b>SERENA M. WOOLF</b> – <i>consent and waiver of notice filed 12/28/11</i></p> <p>Paternal grandfather: <b>GARY S. WOOLF</b> – <i>declaration of due diligence filed 12/28/11</i></p> <p>Maternal grandfather: <b>RALPH J. CALDERON</b> – <i>consent and waiver of notice filed 12/28/11</i></p> <p>Maternal grandmother: <b>GLORIA FLORES</b> – <i>consent and waiver of notice filed 12/28/11</i></p> <p>Petitioners state that the child has resided with them since birth and they have played an active role with their grandson.</p> <p><b>Court Investigator Jennifer Young's report was filed – NEED REPORT.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition is missing Child Information Attachment (Form GC-21(CA)).</li> <li>Need CI report and clearances. (CI to provide).</li> </ol>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			x
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 02/22/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16A - Woolf</b></p>		

16A

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Izaiah age: 3 years DOB: 8/24/2008		TEMPORARY EXPIRES ON 2/29/12	NEEDS/PROBLEMS/COMMENTS:
Adrian age: 2 years DOB: 10/4/2009			
		TRACY THOMAS, maternal grandmother, is Petitioner.	Minute Order from the hearing on the temporary petition dated 1/11/12 states the mother and father are to be given notice for the hearing on the general petition.
Cont. from		Father: <b>C.J. BRYANT</b> – <i>declaration of due diligence filed 01/10/12</i>	1. Need <i>Notice of Hearing</i> .
	Aff.Sub.Wit.		
✓	Verified	Mother: <b>GINA McADAMS</b> – <i>declaration of due diligence filed 01/10/12</i>	2. Need proof of personal service of the <i>Notice of Hearing</i> along with a copy of the Petition or <i>Consent and Waiver of Notice</i> on: a. C. J. Bryant (father) b. Gina McAdams (mother)
	Inventory		
	PTC	Paternal grandparents: Unknown	3. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the Petition or <i>Consent and Waiver of Notice</i> or <i>Declaration of Due Diligence</i> on: a. Paternal grandparents b. Maternal grandfather
	Not.Cred.		
	Notice of Hrg	Maternal grandfather: Not listed	Court Investigator Samantha Henson to provide:  1. Court Investigator's Report 2. Clearances  Reviewed by: KT Reviewed on: 2/22/12 Updates: Recommendation: File 17 - Bryant
	Aff.Mail	<b>Petitioner states</b> that both of the children have lived with her since birth with their parents in and out of their lives. Petitioner states that she wants to provide a safe and stable home for the children.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	X	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

**Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C 1820, 1821, 2680-2682)**

<b>Age: 49</b>		<b>NO TEMPORARY REQUESTED</b>  <b>JOEL D. CARIAGA</b> , Spouse, is Petitioner and requests appointment as conservator of the person with medical consent powers and as conservator of the estate.  <b>Voting rights affected</b>  <b>A Capacity Declaration was filed 1-20-12.</b>  <b>Estimated Value of Estate: <i>Not provided</i></b>  <b>Petitioner does not state a reason for the conservatorship in the Petition. (#5.c.(1) is blank and there is no attachment.)</b>  <b>Court Investigator Julie Negrete filed a report on 2-16-12.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service of Notice of Hearing with a copy of the Petition on all relatives at least 15 days prior to the hearing per Probate Code §1822 and Cal. Rule of Court 7.51.  <u>Note:</u> The petition does not list any relatives; however, the Court Investigator's report mentions that the proposed conservatee has children, siblings, and possibly parents (the children stay with their grandparents).  <u>Note:</u> See Cal. Rule of Court 7.51 regarding direct notice to minors with copy to adult with whom they reside.  3. Need Citation.  4. Need proof of personal service of Citation with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1824 on the proposed conservatee Perla A. Cariaga.  5. Need video receipt pursuant to Local Rule 7.15.8.  6. Need clarification as to the nature and value of the assets for bonding purposes pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.				
<b>DOB: 4-18-62</b>							
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>						
<input checked="" type="checkbox"/>	<b>Verified</b>						
<input type="checkbox"/>	<b>Inventory</b>						
<input type="checkbox"/>	<b>PTC</b>						
<input type="checkbox"/>	<b>Not.Cred.</b>						
<input type="checkbox"/>	<b>Notice of Hrg</b>			<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Mail</b>			<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>						
<input type="checkbox"/>	<b>Sp.Ntc.</b>						
<input type="checkbox"/>	<b>Pers.Serv.</b>			<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>						
<input checked="" type="checkbox"/>	<b>Letters</b>						
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>						
<input type="checkbox"/>	<b>Objections</b>						
<input type="checkbox"/>	<b>Video Receipt</b>			<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>CI Report</b>						
<input type="checkbox"/>	<b>9202</b>						
<input checked="" type="checkbox"/>	<b>Order</b>						
<input type="checkbox"/>	<b>Aff. Posting</b>						
<input type="checkbox"/>	<b>Status Rpt</b>						
<input type="checkbox"/>	<b>UCCJEA</b>						
<input type="checkbox"/>	<b>Citation</b>	<input checked="" type="checkbox"/>					
<input type="checkbox"/>	<b>FTB Notice</b>						
<table border="1"> <tr> <td><b>Reviewed by:</b> skc</td> </tr> <tr> <td><b>Reviewed on:</b> 2-22-12</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File 18 - Cariaga</b></td> </tr> </table>			<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 2-22-12	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 18 - Cariaga</b>
<b>Reviewed by:</b> skc							
<b>Reviewed on:</b> 2-22-12							
<b>Updates:</b>							
<b>Recommendation:</b>							
<b>File 18 - Cariaga</b>							

Atty Harris, James Earl Jr. MD (pro per – half-brother/Petitioner)

Atty Harris, Rosina Maria (pro per – half-sister in law/Petitioner)

## Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Jammy, 9 DOB: 08/14/02	<p align="center"><b><u>GENERAL HEARING 04/23/12</u></b></p> <p><b>JAMES EARL HARRIS, JR., M.D. and ROSINA MARIA HARRIS</b>, half-brother and half-sister in law, are Petitioners.</p> <p>Father: <b>JAMES EARL HARRIS, SR.</b> – <i>deceased</i></p> <p>Mother: <b>RAJANNE ANGELIC JEFFERSON</b> – <i>personally served 02/14/12</i></p> <p>Paternal grandfather: <b>HENRY BLACK</b> – <i>deceased</i></p> <p>Paternal grandmother: <b>GRACIE MAE HARRIS</b> – <i>deceased</i></p> <p>Maternal grandparents: <b>UNKNOWN</b></p> <p>Petitioners state that the children's father died unexpectedly on 02/16/12. Their father had sole custody of both of the children as the mother is not fit to provide a safe home and has been charged with child abuse in the past and currently has charges against her for assault with a deadly weapon. Since the father's death, the children have been in their mother's care. Petitioners state that they can provide the children with a safe and loving home and provide them with a better life. Petitioners state that they fear for the children's safety while in the care of their mother due to her history.</p>	NEEDS/PROBLEMS/COMMENTS:
Jarvis, 8 DOB: 01/11/04		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: JF		
Reviewed on: 02/22/12		
Updates:		
Recommendation:		
File 19 – Harris & Jefferson		



Atty Davis, Deborah (pro per – maternal great-aunt/Petitioner)

## Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Richard, 3 DOB: 11/14/08	<p align="center"><b><u>GENERAL HEARING 04/17/12</u></b></p> <p><b>DEBORAH DAVIS</b>, maternal great-aunt, is Petitioner.</p> <p>Father: <b>UNKNOWN</b></p> <p>Mother: <b>CASSANDRA ROBLES</b> – <i>consent and waiver of notice filed 02/14/12</i></p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandfather: PETE ROBLES Maternal grandmother: TRACEY BEHN</p> <p>Petitioner states that the mother is suffering from serious health conditions that are limiting her ability to walk and take care of herself. A family friend who had been assisting the mother left and the mother is not able to care for them herself. Petitioner states that the children moved in with her on 02/06/12. Mother is in agreement with the guardianship due to her medical problems.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Guardianship Petition</i> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Father (unknown)</li> </ol>	
Terrance, 3 DOB: 11/14/08			
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			x
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			x
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 02/22/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 20 - Reyes</b></p>			

Atty Garcia, Elsa (pro per – paternal aunt/Petitioner for Alfredo/Alyssa)

## Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Alfredo, 5 DOB: 08/24/06		<b><u>GENERAL HEARING 04/11/12</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Alyssa, 9 DOB: 02/11/03			
		ELSA GARCIA, paternal aunt, is Petitioner.	This Petition pertains to Alfredo and Alyssa Ortiz only. A Petition guardianship of Jaylen and Agustin by another paternal aunt, Guadalupe Villagomez was heard on 02/27/12.
Cont. from		Father: JOSE AGUSTIN LEON – <i>incarcerated</i>	<ol style="list-style-type: none"> <li>1. UCCJEA is incomplete. Need children's residence address from birth to 02/03/12.</li> <li>2. Need <i>Notice of Hearing</i>.</li> <li>3. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Temporary Guardianship or Consent and Waiver of Notice or Declaration of Due Diligence</i> for: - Jose Agustin Leon (father) - Roseana Ortiz (mother)</li> </ol>
Aff.Sub.Wit.		Mother: ROSEANA ORTIZ – <i>currently incarcerated</i>	
✓ Verified		Paternal grandfather: AGUSTIN LEON Paternal grandmother: PETRA GARCIA AUMADA	
Inventory		Maternal grandfather: DECEASED Maternal grandmother: IRENE ORONA	
PTC		Siblings: AGUSTIN LEON, JAYLEN ORTIZ	
Not.Cred.		Petitioner states that both parents are incarcerated. The children had been living with their mother prior to her being arrested. The mother's home was very dirty, with no gas and no food in the refrigerator. The mother was evicted from her home for not paying the rent.	
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 02/17/12
			Updates:
			Recommendation:
			File 21 – Ortiz & Leon